

Current State Analysis | Stakeholder Interview Protocol

INSTRUCTIONS

Use this protocol when conducting stakeholder interviews to uncover current-state business processes, content scope, requirements and issues. Meet with each business unit within the organization to ascertain what kinds of content each user group or business unit handles, what the publication and production processes are, and any issues, gaps, or redundancies with their processes or quality of content. Interview authors, content contributors, and other members of each line of business who work with content daily. Span the organizational matrix, interviewing junior, mid-level and senior leaders. Meet with one person at a time, if possible. Also, have another team member such as a project manager capture all notes during the interview. You should schedule two hours for the interview. Be sure to send the protocol before the meeting, and list any deliverables and/or examples you would like the interviewee to bring. If you are remote, set up Web-share for meetings, so that the interviewee can show you file structures, or CMS screens.

PROTOCOL

Production and Publication Processes

- What aspects of content acquisition, production, or delivery work successfully in your group? What aspects have issues? What are your greatest pain points?
- How do these kinds of content or processes add value to the organization? What does not add value?
- What are the larger issues that you face in terms of content acquisition, production or delivery?
- How many internal stakeholders and subject matter experts (SMEs) are there? This is what we know of thus far (list them), what are we missing?
- What types of politics or “issues” exist today between business units or owner/SME groups? Will these units or groups debate about what terminology should be used or about what kind of content should be classified, where, and how, or about who owns which content?
- Is the high-level publication or production process flow documented or captured? If you don’t have one documented, what are the high-level steps? Are the sub-processes within the primary flow documented? Ensure that we capture owners, content creators, reviewers and approvers with each process and any inputs and outputs.
- Could you help us construct the production process model for each additional content type from a bottom-up: for example, marketing messaging content, product-related content, customer support content, etc.? Ask for any issues, gaps, sub-process flows, choking points and advantages for each end-to-end process.
- Do you localize content into different languages for multiple regions? If so, what does this model look like for a process flow? Do you start with one language and one content source and then translate from that source? How do you ensure that the content is messaged adequately to each region? Is the model decentralized? What are the issues and choking points experienced here?
- Is there a content migration strategy in place? Is there an archival process?

Content Inventory and Scope

- Do you have a list of all the different types of content you work with? Do you any inventories or have you performed audits that we could leverage to determine the scope of the content we must consider? Is there a sitemap (for Websites) or any IA work that I could leverage to determine the content types and scope?
- In terms of quantity and volume, how much content is there? How much is published during a set period?

Technology

- Is there a CMS, DMS or other types of publication systems in place today? If so, what is it?
- Are there other document management, knowledge management or content management systems that need to be considered?
- What are the different channels that we should consider? These include systems or platforms such as Web, mobile, and customer databases, CRM, analytics engines?
- What are all the systems that impact content: for example, product catalogues, asset /document management tools, etc.? What are the strengths of the systems? What are the pain points of the systems? Are there gaps or integration issues?
- Is there a product database of any sort in existence today? What product characteristics are accounted for within it: for example, name, description, number, etc.? Do you have a product hierarchy? Is this documented in a schema?
- Will users need the ability to create, or will they just upload/migrate existing content and tag it?

Marketing Strategy

- How many markets, regions or locales do we need to consider, insofar as content rollout is concerned?

Taxonomy and Search

- Has the business unit or group received any user feedback, whether internal, external, formal or informal, regarding search and/or find-ability of content? Do you have information on end-user feedback with regard to accessing information?
- Do you currently have any search engine optimization in place? If so, what? How do you do it? Are analytics a component of it? Which tools do you use? Are authors trained on it?
- If there is a Website, Portal or CMS? How is information within it organized today? Do data models or schemas exist that we might access?
- Does any terminology need to be created from scratch or re-written?
- Are you trying to better categorize content types? Or re-categorize content types? Should content types be categorized by a specific business need?
- Are there requirements to index and maintain content that is not in use? If so, how is it stored and indexed?

- Do you have any taxonomies or metadata schemas in place? Do you know what a taxonomy is? Are there tools in place to manage either?
- What do you want the taxonomy to do? E.g.: personalize content, organize content, facilitate cross sell/ up sell?
- Who has the definitive source for which terms get used in your organization? Are there taxonomies, thesauri, metadata structures and/or synonym rings or controlled vocabularies in place within your organization?
- Do we have a listing of terms used to classify your data from an end-user or consumer-research perspective?
- How does content get tagged in your organization? Are users trained on it? Do they have the software? Do they need trained?

Editorial and Brand Strategy

- Does your organization enforce a content style guide or branding guide? Could I obtain all information and documentation, related to content standards that your business unit or group use?
- Is there intelligence built into the content currently? Do you personalize content? Do you up sell/cross sell or use CRM to target content to specific users? Do you have different states at which a user can access content? What are the current 'flavours' of content? Are there decision trees that are documented insofar as user access to content is concerned?

Governance

- What types of governance are in place for content? Are there issues that your business unit or group experience with the governance structure? Ascertain how the governance structure functions, and who is responsible for its development and enforcement. Do you have a governance model you can share with me? Is there a charter? How often does it meet? Who is involved with it?
- If the governance does not exist by committee, does it exist in the format of standards or regulations?